



**SharedIntel AI**

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BROUGHT TO YOU BY *SHAREDINTEL AI*

## **AI TOOLS FOR PRINT & SIGN SHOPS**

**YOUR PRACTICAL FIELD GUIDE**

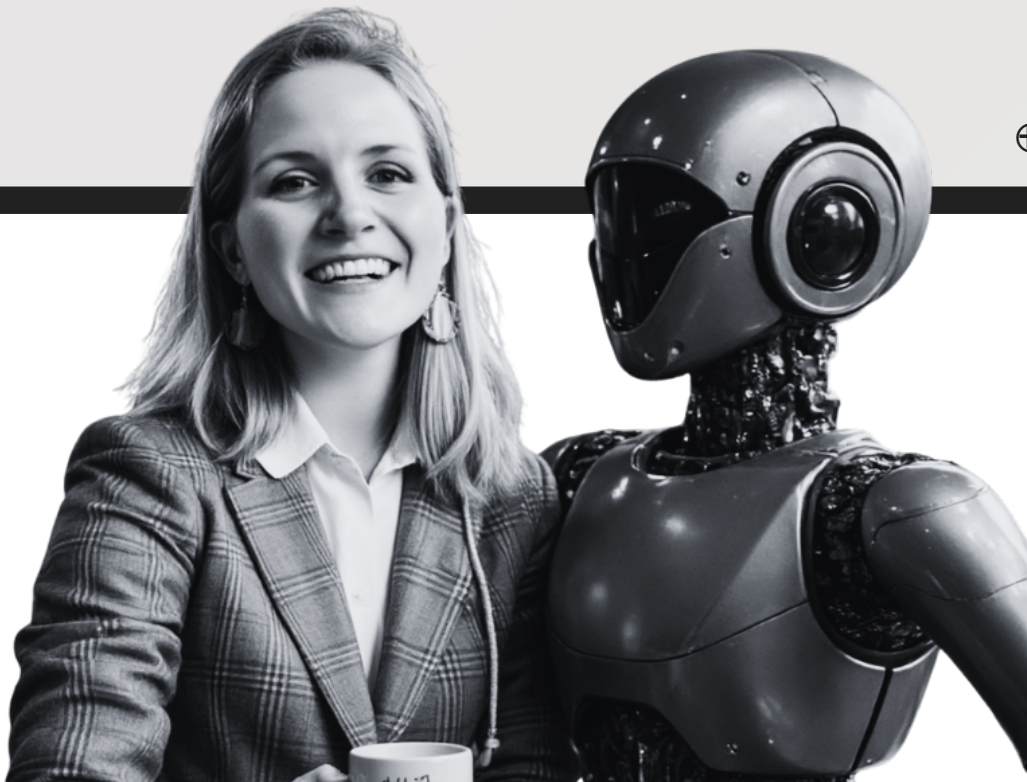
COMPANION RESOURCE

Designed for Owners, Production Managers, and Operators

DATE: April 9, 2026

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# WELCOME: YOU'RE NOT BEHIND



Dear Industry Colleague,

If you're reading this, you probably feel like technology is moving faster than your shop can keep up. You hear about AI everywhere, but when you look at your own floor—at the CNC router, the flatbed printer, the endless pile of work orders—it feels like a different world.

**Here is the truth: Most shops are exactly where you are.**

Most of your competitors are still using AI just to write funny emails or generate fun images. Very few have figured out how to use it to actually get orders out the door faster without compromising quality.

This guide is not about "digital transformation" or futuristic theory. It is a **Field Manual**. It is designed for people who have ink on their hands and deadlines to meet.

## OUR PROMISE TO YOU

Every tool in this guide was selected based on two simple criteria:

1. Does it solve a real, painful problem in a print shop?
2. Can it save you time or money by next Monday morning?

We focus on **OPERATIONS** and **MARGINS**. We know you don't need more "cool tricks." You need to stop spending 3 hours on estimates that should take 15 minutes. You need to stop chasing clients for vector files. You need to find labor when no one is applying for jobs.

Take a breath. You don't need to learn all of this overnight. Pick one tool. Try it. See if it works. Then move to the next.

Let's get to work.



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# HOW TO USE THIS GUIDE



This document is structured like a technical manual, not a book. You do not need to read it front to back. Jump to the section that hurts the most.

## PICK YOUR PAIN POINT

IF YOU ARE STRUGGLING WITH...	GO TO SECTION...
"I can't find enough qualified staff."	Category 2: The Automation Layer
"My sales team is wasting time on bad leads."	Category 3: Sales & Business Development
"Estimates and admin work are killing my day."	Category 1: The Thinking Partners
"We need better marketing but have no designer time."	Category 4: Asset Creation

## ROLE-BASED READING PATHS

<p><b>FOR SHOP OWNERS</b></p> <hr/> <p>Focus on <b>The Business Impact</b> section for each tool. Look for high ROI and labor-saving potential.</p> <p><i>Time to read: 15 mins (scan headlines)</i></p>	<p><b>FOR PRODUCTION MGRS</b></p> <hr/> <p>Focus on <b>Capabilities That Matter</b>. Look for tools that reduce errors in pre-flight and handoffs.</p> <p><i>Time to read: 30 mins (deep dive)</i></p>
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# SHAREDINTEL AI'S EVAL SYSTEM

We evaluate every single tool using the same 8-point framework. This ensures we cut through the marketing hype and get straight to the shop-floor reality.

## ⚠️ PAIN POINT

### WHY PROBLEM-BASED LEARNING?

Adults in technical fields learn best when solving a specific problem. We don't start with "What is AI?" We start with "Why does this specific task hurt right now?"

## THE 8 EVALUATION POINTS

### 1. THE PROBLEM

What shop-floor pain point does this solve? (e.g., "Endless artwork revisions")

### 2. THE TOOL

What does it actually do? (Plain English explanation)

### 3. CAPABILITIES

The 3-5 specific features that matter for a sign business.

### 4. VS. CHATGPT

How is this different from the tool you already know?

### 5. USE CASES

Real-world examples: Sales, Production, Install.

### 6. TRY IT NOW

A copy-paste prompt or workflow to test this week.

### 7. BUSINESS IMPACT

The ROI. Time saved, money made, errors stopped.

### 8. YOUR ACTION

One clear next step to take immediately.

# FIVE WAYS AI CAN SAVE YOUR SHOP



We have organized the 20 tools into five operational categories based on where they fit in your workflow.

## CATEGORY 1: THE THINKING PARTNERS

**Best For:** Front office, estimating, strategy, difficult emails.

*Tools: ChatGPT / Gemini / Claude, NotebookLM, Perplexity AI*

## CATEGORY 2: THE AUTOMATION LAYER

**Best For:** Connecting disparate systems, reducing data entry errors.

*Tools: Zapier, Clay.com, Numerous.ai*

## CATEGORY 3: SALES & BIZ DEV

**Best For:** Finding new clients, warming up leads, follow-ups.

*Tools: Apollo.io, PlanProphet, GenSpark, Instantly*

## CATEGORY 4: ASSET CREATION + PRODUCTION AUTOMATION

**Best For:** Marketing materials, concept art, proposals, and intelligent print production OS.

*Tools: MidJourney, Gamma.app, Napkin.ai, Gelato Connect*





# QUICK REFERENCE MATRIX

All pricing shown is approximate, per user/month (individual plans) as of early 2026. Most tools offer annual discounts of 10–25%. See each tool's profile page for full pricing tiers.

<p><b>● BEGINNER</b></p> <p>No prior AI experience needed. Works like a website or app. Minimal setup. Most users are productive within 30 minutes of signing up.</p>	<p><b>● INTERMEDIATE</b></p> <p>Requires some configuration, connecting accounts, or learning a workflow. Expect 1–3 hours of setup and a short learning curve before it runs smoothly.</p>	<p><b>● ADVANCED</b></p> <p>Complex setup, API connections, or business process re-engineering required. Best piloted by a tech-comfortable owner or operations manager. May need vendor onboarding support.</p>
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TOOL NAME	CATEGORY	PRICING TIERS (APPROX. /MO)	DIFFICULTY	PRIMARY BENEFIT
<b>CATEGORY 1: THINKING PARTNERS</b>				
<b>ChatGPT</b> (OpenAI)	Thinking	Free · Plus <b>\$20</b> · Team <b>\$25–30</b> /user · Enterprise: custom	● Beginner	General-purpose AI writing, analysis, and brainstorming assistant
<b>Gemini</b> (Google)	Thinking	Consumer: free via Google One / Workspace add-ons; API: pay-as-you-go; Workspace enterprise: per-seat custom	● Beginner	Google-integrated AI assistant; strong for Docs, Sheets, and Gmail users
<b>NotebookLM</b> (Google)	Thinking	<b>Free</b> (currently free in most markets during rollout)	● Beginner	Upload your documents; ask questions, get grounded answers—no hallucinations from web
<b>Perplexity AI</b>	Thinking	Free · Pro <b>\$20</b> /mo or <b>\$200</b> /yr · Enterprise Pro <b>\$40</b> /user/mo	● Beginner	Real-time AI search with cited sources—faster, more accurate than Google for research
<b>CATEGORY 2: AUTOMATION LAYER</b>				
<b>Zapier</b>	Automation	Free tier · Starter from <b>~\$20</b> /mo · Professional/Team and up (scales with task volume)	● Intermediate	Connect 7,000+ apps with no-code automation; eliminate manual data re-entry

TOOL NAME	CATEGORY	PRICING TIERS (APPROX. /MO)	DIFFICULTY	PRIMARY BENEFIT
<b>Clay.com</b>	Automation	Launch <b>\$185/mo</b> · Growth <b>\$495/mo</b> · Enterprise: custom (workspace pricing, not per-seat)	● Advanced	AI-powered data enrichment and outreach automation; builds custom prospect databases
<b>Numerous.ai</b>	Automation	Low per-user entry pricing (tiers not fully public); usage-based scaling available	● Intermediate	Run AI formulas inside Google Sheets / Excel—automate classification and data tasks
<b>CATEGORY 3: SALES &amp; BUSINESS DEVELOPMENT</b>				
<b>Apollo.io</b>	Sales	Free tier · Basic/Professional plans from <b>~\$79/user/mo</b> ; team and org plans higher	● Intermediate	B2B prospect database + outreach sequencing; find & contact decision-makers
<b>PlanProphet</b>	Sales	Starts at <b>~\$450/mo</b> (no free version; CRM/MIS-style pricing)	● Advanced	Print-specific CRM and MIS automation—quotes, job tracking, client lifecycle
<b>GenSpark</b>	Sales	Free · Plus <b>\$25/mo</b> · Pro <b>\$249/mo</b>	● Beginner	AI-powered market research and content generation; builds websites and presentations
<b>Instantly</b>	Sales	Growth <b>\$37/mo</b> · Hypergrowth <b>\$97/mo</b> · Light Speed <b>\$358/mo</b> ; lead-gen add-ons from <b>~\$38/mo</b>	● Intermediate	High-volume cold email outreach automation with AI personalization and inbox warming



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## QUICK REFERENCE MATRIX (CONTINUED)

TOOL NAME	CATEGORY	PRICING TIERS (APPROX. /MO)	DIFFICULTY	PRIMARY BENEFIT
<b>CATEGORY 4: ASSET CREATION</b>				
MidJourney	Assets	Basic <b>\$10</b> · Standard <b>\$30</b> · Pro <b>\$60</b> · Mega <b>\$120/mo</b> (~20% off annually)	● Intermediate	AI image generation—custom illustrations, mockup backgrounds, textures, and icon sets
Gamma.app	Assets	Free · Plus <b>\$8/seat</b> · Pro <b>\$18/seat</b> · Ultra <b>\$100/seat</b> (annual pricing)	● Beginner	AI-generated presentation decks and proposals—from outline to designed slides in minutes
Napkin.ai	Assets	<b>Free</b> (Starter & Professional free during beta); Enterprise: custom	● Beginner	Convert text into visual flowcharts, timelines, and diagrams instantly—no design skills needed
Gelato Connect	Production Automation	Custom pricing / Demo required; no public tiers — <a href="https://gelato.com/connect">gelato.com/connect</a>	● Advanced	Intelligent print production OS—AI quoting (15-sec estimates), end-to-end workflow automation, real-time floor tracking & intelligent order routing
<b>CATEGORY 5: VIDEO &amp; AUDIO</b>				
ElevenLabs	Video/Audio	Free · Starter <b>\$5</b> · Creator <b>\$22</b> · Pro <b>\$99</b> · Scale <b>\$330/mo</b> · Enterprise: custom	● Beginner	AI voice generation and voice cloning—professional voiceovers in 60 seconds from any script
HeyGen	Video/Audio	Free · Creator <b>\$29</b> · Pro <b>\$99</b> · Business <b>\$149/mo</b> (annual: ~\$24/\$79/\$119); Enterprise: custom	● Intermediate	AI avatar video generation—talking-head training and proposal videos from scripts, no camera
Descript	Video/Audio	Free · Hobbyist <b>\$24</b> · Creator <b>\$35</b> · Business <b>\$60/mo</b> (annual: ~\$16/\$24/\$50)	● Beginner	Edit video by editing a transcript—remove filler words, auto-caption, and export for social
Otter.ai	Video/Audio	Free · Pro <b>\$17/user</b> · Business <b>\$30/user</b> (annual: ~\$8/\$20/user); Enterprise: custom	● Beginner	Real-time meeting transcription with auto-summaries and action items—works in Zoom/Meet/Teams





# CHATGPT / GEMINI / COPILOT / CLAUDE



CATEGORY 1: THINKING PARTNERS

Cost: \$ | Difficulty: Beginner | Best For: Everyone

## ⚠️ PAIN POINT

### 1. THE SHOP PROBLEM THIS SOLVES

Shop owners and sales reps are drowning in admin work—rewriting emails, chasing approvals, building proposals from scratch, drafting SOPs nobody reads, and manually analyzing job data in spreadsheets. There is no in-house analyst, no dedicated marketing writer, and no spare capacity to think strategically because the urgent always eats the important. The 2025 PRINTING United Alliance study found that 57% of print providers cite lack of in-house expertise as their top AI barrier, and only 7% have a formal AI roadmap. These tools are the fastest way to close that gap without a new hire.

### 2. WHAT THIS TOOL ACTUALLY DOES

A general-purpose **thinking partner and document engine**. You type (or paste) unstructured text—messy emails, rough notes, spreadsheet data—and the AI returns structured, polished outputs: proposals, briefs, emails, checklists, analyses, and marketing copy.

**Where it fits in a sign shop workflow:** Sales and estimating (draft quotes, proposals, follow-ups), Admin and management (policies, job roles, SOPs, meeting summaries), Marketing (blogs, case studies, social media), Training (explainers, process summaries, onboarding docs).

### 3. CAPABILITIES THAT MATTER

WHAT IT DOES	WHY YOUR SHOP CARES
Summarize and clean up messy email threads into clear next steps	Reduces miscommunication between sales, design, and production
Draft proposals, scope documents, install instructions, and SOPs from bullet points	Eliminates blank-page paralysis; shop owner stops being the only person who can write
Analyze CSVs to find profitable job types, top clients, or under-used equipment	Makes basic business intelligence accessible without hiring an analyst
Generate outreach email variations targeting local verticals	Sales reps who hate writing can still prospect effectively
Copilot Pro works inside Word, Excel, Outlook, and PowerPoint natively	No context switching; hours saved per employee per month



## 5. THREE WAYS TO USE THIS IN YOUR SHOP

### Use Case 1: Production Manager - Production Brief Generator

Paste three messy email threads between your shop and a client about a channel letter install. Ask the AI to turn it into a single production brief with project overview, final sizes, materials, install date, site constraints, and open questions. Hand it to the production manager instead of forwarding a 47-email chain.

### Use Case 2: Sales Manager - Good/Better/Best Proposals

Give the AI bullet points about a monument sign or vehicle wrap job. Ask for three price-anchored proposal variants (good, better, best) including timeline, terms, and materials. This saves 30–60 minutes per proposal and standardizes your format.

### Use Case 3: Owner - Job Data Analysis


Export your MIS job data to CSV. Upload it and ask: "Identify my top 20 repeat clients by revenue, my 5 highest-margin job types, and any clients who ordered last year but haven't ordered in the last 6 months." This analysis would typically require a consultant or a spreadsheet wizard.

## 6. TRY THIS WORKFLOW THIS WEEK


### PROMPT TO USE:

"Here are three email threads between my sign shop and a client about a channel letter install. Turn this into a single production brief with: project overview, final sizes, materials, install date, site constraints, and open questions. Assume this will be handed to the production manager."

## 7. THE BUSINESS IMPACT

 **Time Saved:** 8–10 hours weekly for regular business users, roughly \$200–250 in time value

 **Cost Savings:** 18–27% in automated functions across early adopters

 **Productivity Gains:** Average 23% increase in affected departments, with technical writing and analysis seeing 50%+ improvements

 **ROI:** A \$20/month subscription pays for itself 10x over when used regularly

### YOUR ACTION THIS WEEK

Pick one messy customer email thread from this week. Paste it into ChatGPT, Claude, or Copilot. Ask it to create a structured production brief. If it saves you 15 minutes, it has already justified the subscription cost for the month.



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## NOTES:

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# NOTEBOOKLM



CATEGORY 1: THINKING PARTNERS

Cost: Free | Difficulty: Beginner | Best For: Owners/Managers

## ! PAIN POINT

### 1. THE SHOP PROBLEM THIS SOLVES

Knowledge is scattered across PDFs, past proposals, vendor spec sheets, permit documents, and the heads of employees who might leave tomorrow. When a new hire asks "how did we handle that mall install two years ago?" nobody can find the answer quickly. Onboarding is slow, mistakes from past projects get repeated, and institutional memory walks out the door every time someone retires.

### 2. WHAT THIS TOOL ACTUALLY DOES

Google's **document-grounded AI notebook**. You upload your own documents—PDFs, permits, vendor manuals, old proposals, SOPs—and it creates a private AI that can only answer from those specific sources. It generates summaries, outlines, checklists, audio overviews (podcast-style), mind maps, infographics, and training materials, all grounded in your actual data.

**Where it fits:** Training and onboarding, Standardizing install and permitting knowledge, Referencing old jobs, spec sheets, and project post-mortems, RFP response acceleration.

### 3. CAPABILITIES THAT MATTER

WHAT IT DOES	WHY YOUR SHOP CARES
Centralizes PDFs and docs into one searchable "brain"	No more hunting through email and file servers for "how we did X last time"
Answers only from your uploaded sources (no hallucination from the internet)	Critical for permit compliance and spec accuracy
Generates playbooks, checklists, and FAQs from long documents	Turn a 50-page city sign ordinance into a usable quick-reference
Creates audio overviews in podcast format	Install crews can listen to a job brief while driving to a site
Available as NotebookLM Plus and Enterprise with VPC-SC compliance	Data stays private; safe for sensitive proposals and financials

### 4. COMPARISON: THIS TOOL VS. CHATGPT

**CHATGPT IS BETTER FOR:**

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**NOTEBOOKLM IS BETTER FOR:**

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## 5. THREE WAYS TO USE THIS IN YOUR SHOP

### Use Case 1: City Permitting Notebook

Upload all sign ordinance PDFs and past permit applications for your top 5 cities. Staff can ask "What are the max heights for wall signs in Zone C?" and get a cited answer in seconds instead of calling the city or flipping through 80-page documents.

### Use Case 2: Installation Playbook

Upload your SOPs, vendor install manuals, and internal post-mortem notes from the last 10 major installs. Ask NotebookLM to "identify the 5 most common problems we encountered and suggest a standard pre-install checklist."

### Use Case 3: RFP Response Accelerator





Upload your previous winning proposals. When a new RFP arrives, ask NotebookLM to draft responses to each question based on your proven language and past wins.

## 6. TRY THIS WORKFLOW THIS WEEK

### WORKFLOW:

Create one Notebook called "Mall Install Jobs." Upload 3-5 past job folders (proposals, emails, photos, post-mortems). Ask: "Summarize the common issues we ran into during mall installs and suggest a standard pre-install checklist based on these documents."

## 7. THE BUSINESS IMPACT

-  **Time Saved:** Turns messy documents into structured, searchable outputs—from hours to minutes
-  **Onboarding:** Reduces time for new staff by making institutional knowledge queryable
-  **Dependency Reduction:** Less reliance on the one "knowledge hoarder" employee
-  **RFP Speed:** Response time drops dramatically when AI can draft from your winning proposal library

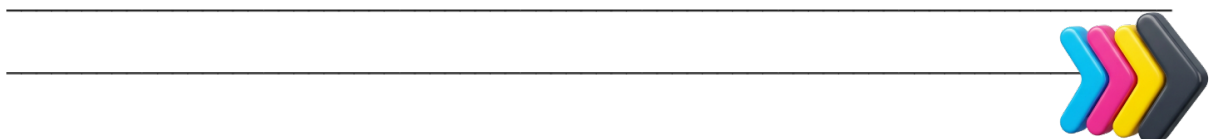
### YOUR ACTION THIS WEEK

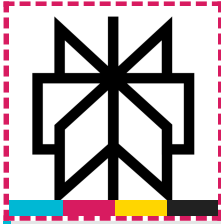
Upload 5 documents related to one project type you do repeatedly (e.g., monument signs, vehicle wraps, ADA signage). Ask it to generate a standard project checklist. If the checklist is 80% right, you just created an SOP in 5 minutes instead of never.



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# PERPLEXITY AI



CATEGORY 1: THINKING PARTNERS

Cost: \$\$ | Difficulty: Beginner | Best For: Research

## ! PAIN POINT

### 1. THE SHOP PROBLEM THIS SOLVES

Owners need fast, reliable research—comparing substrates, checking local sign codes, evaluating new equipment, scouting competitors—but don't have hours to wade through Google results, manufacturer brochures, and forum threads. Most shop owners default to "asking their rep" or "Googling for 20 minutes and giving up," leading to decisions based on incomplete information.

### 2. WHAT THIS TOOL ACTUALLY DOES

An AI-powered **research assistant** that answers questions with cited sources and can follow up deeply. Unlike ChatGPT, which generates answers from training data, Perplexity searches the live web and returns answers with links to where each fact came from.

**Where it fits:** Equipment research and vendor comparison, Local code and regulation lookups, Marketing and competitive research, Material and substrate comparison.

### 3. CAPABILITIES THAT MATTER

WHAT IT DOES	WHY YOUR SHOP CARES
Gives sourced, cited answers instead of opinions	Critical when evaluating \$100K+ equipment purchases
Live web search with real-time data	Gets current pricing, availability, and specs—not last year's
Deep follow-up chains	Ask a question, then drill deeper without starting over
Enterprise plan at ~\$20/user/month with 10M+ monthly active users	Affordable even for small teams

### 4. COMPARISON: THIS TOOL VS. CHATGPT

#### CHATGPT IS BETTER FOR:

Creating content and custom workflows

#### PERPLEXITY IS BETTER FOR:

Live research with citations—the "research analyst you never had"

## 5. THREE WAYS TO USE THIS IN YOUR SHOP

### Use Case 1: Equipment Evaluation

"Compare 3 flatbed printers suitable for a mid-size sign shop under \$150K. List print speed, max substrate size, ink type, warranty, and typical customer complaints. Cite manufacturer or review sources."

### Use Case 2: Code Compliance

"Summarize ADA signage requirements for [STATE], including tactile lettering, Braille placement, mounting heights, and contrast ratios. Cite federal or state sources."

### Use Case 3: Competitive Intelligence

"Find 5 sign companies in [CITY] that offer vehicle wraps. What services do they advertise, what are their Google review ratings, and what differentiates their marketing?"

## 6. TRY THIS WORKFLOW THIS WEEK

### PROMPT TO USE:


"What are the top 5 considerations when wrapping textured brick in outdoor conditions? Include manufacturer guidance for 3M IJ180Cv3 or Avery MPI 1105. Cite sources."

## 7. THE BUSINESS IMPACT

 **Time Saved:** Better, faster capex and material decisions with reduced vendor-driven bias

 **Research Efficiency:** Saves hours of scattered Googling before trade shows or major purchases

 **Adoption:** Projected \$656M ARR for 2026 reflects massive adoption velocity

 **Cost Savings:** Databricks saved 5,000 working hours monthly; senior analyst saving 2 hours/week recoups annual cost in ~5 weeks

### YOUR ACTION THIS WEEK

Before your next equipment purchase or material decision, use Perplexity instead of Google. If it gives you a sourced comparison in 3 minutes instead of 30, it's your new research standard.



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# ZAPIER



CATEGORY 2: AUTOMATION LAYER

Cost: \$\$ | Difficulty: Intermediate | Best For: Ops Manager

## ! PAIN POINT

### 1. THE SHOP PROBLEM THIS SOLVES

Double entry between Apollo, CRM, email tools, spreadsheets, and project management systems wastes hours every week and creates data inconsistencies. When a lead replies, someone has to manually update the CRM, create a task, and notify the sales rep.

### 2. WHAT THIS TOOL ACTUALLY DOES

A **workflow automation platform** that connects 8,500+ apps so events in one tool trigger actions in others—no coding required. "When a new Apollo contact is created, also add to CRM and create a task in project tool."

**Where it fits:** Eliminating manual data entry, Connecting disconnected tools, Automating repetitive tasks, Reducing human error in handoffs.

### 3. CAPABILITIES THAT MATTER

WHAT IT DOES	WHY YOUR SHOP CARES
8,500+ app integrations	Connects virtually any tool you already use
Multi-step Zaps with conditional logic	Build complex workflows (if lead replies → update CRM + notify rep + create task)
83% of businesses report ROI within 6 months; average first-year return of 287%	Fast payback, measurable savings
Saves 30–70% of task time on repetitive processes	Biggest impact on high-frequency admin tasks
Zapier crossed \$420M ARR in Q1 2026—163% growth since 2022	Industry standard; not going anywhere

### 4. COMPARISON: THIS TOOL VS. CHATGPT

#### CHATGPT IS BETTER FOR:

Thinking through problems and generating content

#### ZAPIER IS BETTER FOR:

Actually connecting your tools and automating repetitive data movement

## 5. THREE WAYS TO USE THIS IN YOUR SHOP

### Use Case 1: Lead Routing

New form submission on website → create contact in CRM → assign to sales rep → send Slack notification → schedule follow-up task.

### Use Case 2: Quote Follow-Up

When a quote is created in your MIS → automatically schedule a follow-up email in 3 days → if no response, escalate to sales manager.

### Use Case 3: Apollo → CRM Sync


When a prospect replies to an Apollo sequence → add to CRM pipeline → create a task for the sales rep → send a Slack alert.

## 6. TRY THIS WORKFLOW THIS WEEK

### WORKFLOW:

Identify one task you do manually at least 5 times per week (e.g., copying form data into a spreadsheet or CRM). Build a Zap to automate it. Calculate the time saved over a month.

## 7. THE BUSINESS IMPACT

 **Time Saved:** 30–70% task time reduction on automated processes

 **ROI:** 287% average first-year return on investment

 **Data Quality:** Eliminates the "data falls through the cracks" problem

 **Pricing:** Start at \$19.99/mo; scale as needed

### YOUR ACTION THIS WEEK

Identify one task you do manually at least 5 times per week. Build a Zap to automate it. If it saves 30 minutes this week, calculate what that's worth over a year.



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# CLAY.COM



CATEGORY 2: AUTOMATION LAYER

Cost: \$\$\$ | Difficulty: Advanced | Best For: Sales Ops

## ! PAIN POINT

### 1. THE SHOP PROBLEM THIS SOLVES

Prospect data from CRM, Apollo, LinkedIn, and other sources is fragmented, incomplete, and stale. Enriching contacts manually across multiple providers is slow and expensive.

### 2. WHAT THIS TOOL ACTUALLY DOES

A **data enrichment and prospecting automation platform** that pulls from 150+ data providers using "waterfall enrichment"—checking sources sequentially until the needed information is found. Used by Anthropic, OpenAI, Intercom, and Vanta for their own lead enrichment.

**Where it fits:** Sales prospecting, Data enrichment, Lead scoring, Research automation.

### 3. CAPABILITIES THAT MATTER

WHAT IT DOES	WHY YOUR SHOP CARES
Waterfall enrichment across 150+ data providers	Get the best data from multiple sources automatically—coverage jumps from 40% to 80%
AI research agent (Claygent) for personalized web research at scale	"Find all retail locations opening soon in [CITY] whose current storefront signage looks outdated"
CRM sync with Salesforce and HubSpot	Enriched data flows into your existing system
No-code automation builder	Build prospecting workflows without a developer

### 4. COMPARISON: THIS TOOL VS. APOLLO

**APOLLO IS BETTER FOR:**

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Quick-start prospecting with built-in sequences

**CLAY IS BETTER FOR:**

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Data enrichment depth, multi-source verification, and building custom prospecting workflows

## 5. THREE WAYS TO USE THIS IN YOUR SHOP

### Use Case 1: Lead Enrichment

Upload your current prospect list (even a basic spreadsheet with company names and contact names). See how much additional data (emails, phone numbers, company size, tech stack) Clay finds.

### Use Case 2: Competitive Intelligence

Use Claygent to research competitors in your market: "Find sign shops in [REGION] that have opened in the last 2 years, get their website, services offered, and social media presence."

### Use Case 3: Multi-Location Prospect Building





Target franchise or multi-location businesses: "Find retail chains with 10-50 locations in [STATE], get facility manager contacts, and verify current signage vendor if publicly visible."

## 6. TRY THIS WORKFLOW THIS WEEK

### WORKFLOW:

Upload your current prospect list (even a basic spreadsheet with company names and contact names) into Clay's free trial. See how much additional data it finds compared to what you started with.

## 7. THE BUSINESS IMPACT

-  **Coverage Increase:** Jump from 40% to 78–80% with waterfall enrichment
-  **Trust Factor:** Trusted by leading tech companies (Anthropic, OpenAI) for their own lead pipelines
-  **Accuracy:** Reduces reliance on any single data provider's accuracy
-  **Efficiency:** Automates research that would take days manually

### YOUR ACTION THIS WEEK

Upload your current prospect list into Clay's free trial. If it finds 30%+ more usable contact data than you had before, you've just unlocked a major prospecting advantage.



email: [Contact@SharedIntelAI.com](mailto:Contact@SharedIntelAI.com)

**NOTES:** \_\_\_\_\_

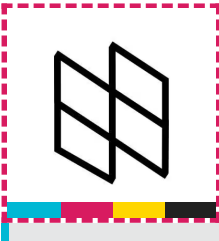
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# NUMEROUS.AI



CATEGORY 2: AUTOMATION LAYER

Cost: \$10-30/mo | Difficulty: Beginner | Best For: Admin/Sales

## ! PAIN POINT

### 1. THE SHOP PROBLEM THIS SOLVES

Your shop lives in Excel and Google Sheets—job tracking, material orders, client lists, estimating templates—but every time you need to extract data, categorize something, or enrich a list, you're stuck with manual work or complex formulas nobody understands. Your estimator spends 2 hours a week copying and pasting client info from emails into spreadsheets. Your sales manager manually categorizes leads by industry. There's no Excel wizard on staff, and nobody has time to learn Power Query.

### 2. WHAT THIS TOOL ACTUALLY DOES

Numerous.ai is a **ChatGPT add-in for Excel and Google Sheets** that lets you use AI directly inside your spreadsheets. Type a plain-English prompt into a cell (like "Categorize this company name by industry" or "Extract phone numbers from this text"), and it fills in the answer—instantly scalable across thousands of rows.

**Where it fits:** Lead categorization and enrichment, Data cleaning and extraction, Sentiment analysis on client feedback, Bulk text processing (emails, notes, descriptions).

### 3. CAPABILITIES THAT MATTER

WHAT IT DOES	WHY YOUR SHOP CARES
Works directly inside Excel and Google Sheets—no exports, no context switching	Your team already knows Sheets; no new software to learn
Use natural language prompts like "extract city from address" or "categorize by vertical"	Non-technical staff can automate complex tasks without formulas
Scales across entire columns instantly	Categorize 500 leads in 30 seconds instead of 3 hours
Handles messy, unstructured data (emails, notes, descriptions)	Finally clean up that Frankenstein CRM export from 2019
\$10-30/month with generous free tier	Accessible even for single-user shops

### 4. COMPARISON: THIS TOOL VS. CHATGPT

**CHATGPT IS BETTER FOR:**

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**NUMEROUS IS BETTER FOR:**

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## 5. THREE WAYS TO USE THIS IN YOUR SHOP

### Use Case 1: Sales Manager - Lead Categorization

You have a spreadsheet with 300 company names from a purchased list. Use Numerous to auto-categorize them by industry (retail, healthcare, hospitality, construction) so your sales team can prioritize the right verticals. Prompt: "Categorize this company into one of these industries: Retail, Healthcare, Hospitality, Construction, Other."

### Use Case 2: Estimator - Client Data Extraction

You receive job requests via email and copy them into a tracking sheet. Client addresses are inconsistent—some say "123 Main St, Orlando FL," others just "Main Street." Use Numerous to extract clean city names for sales territory assignment. Prompt: "Extract the city name from this address."

### Use Case 3: Production Manager - Sentiment Check on Feedback

After each big install, you collect brief client feedback in a sheet. Use Numerous to flag negative sentiment automatically so you can respond fast. Prompt: "Rate this feedback as Positive, Neutral, or Negative."


## 6. TRY THIS WORKFLOW THIS WEEK

### WORKFLOW:


1. Install the Numerous.ai add-on for Google Sheets or Excel.
2. Open a sheet with a messy company name column.
3. In the next column, type: =AI("Categorize this company by industry: " & A2)
4. Press Enter. Numerous will return the category.
5. Drag the formula down the column—it runs instantly for all rows.

If it works, you just saved hours of manual categorization.

## 7. THE BUSINESS IMPACT

 **Time Saved:** Tasks that took 2-3 hours now take 2-3 minutes—100x speed improvement for bulk data tasks

 **Labor Cost:** Admin and sales staff stop wasting time on manual data entry and categorization

 **Data Quality:** Consistent categorization and extraction—no more "sometimes we call it Retail, sometimes Store"

 **ROI:** \$10/month pays for itself if it saves 30 minutes of admin time per week

### YOUR ACTION THIS WEEK

Install Numerous.ai on your most-used spreadsheet (Google Sheets or Excel). Pick one messy column—company names, addresses, or feedback notes. Use a simple AI prompt to clean or categorize it. If it works, you've unlocked spreadsheet superpowers.



# APOLLO.IO



CATEGORY 3: SALES & BIZ DEV

Cost: \$49-149/mo | Difficulty: Intermediate | Best For: Sales

## ! PAIN POINT

### 1. THE SHOP PROBLEM THIS SOLVES

Your sales team is stuck cold-calling reception desks or scraping LinkedIn manually. You know there are property managers at big retail centers, facilities directors at universities, and purchasing agents at hospital systems in your area—but you have no systematic way to find their direct emails and phone numbers. Your CRM is full of "info@company.com" addresses that go nowhere, and your reps waste half their day trying to find decision-makers.

### 2. WHAT THIS TOOL ACTUALLY DOES

Apollo.io is a **B2B contact database and sales automation platform** with over 275 million contacts. You can search for prospects by job title, company size, industry, and location—then Apollo gives you their direct email, phone number, and LinkedIn profile. It also tracks email opens, manages follow-ups, and integrates with your CRM.

**Where it fits:** Lead generation and prospecting, Email outreach campaigns, CRM enrichment, Sales pipeline management.

### 3. CAPABILITIES THAT MATTER

WHAT IT DOES	WHY YOUR SHOP CARES
275M+ B2B contacts with direct emails and phone numbers	Stop wasting time hunting for decision-maker contact info—it's already there
Search by job title, industry, company size, geography	Build targeted lists: "Facilities Managers at universities in Texas with 500+ employees"
Email sequence automation with open/click tracking	Send personalized follow-ups automatically; know who's interested before you call
Chrome extension enriches LinkedIn profiles in real time	Browsing a prospect's LinkedIn? Apollo shows their email and phone instantly
Integrates with HubSpot, Salesforce, and most CRMs	Enrich your existing CRM data without rebuilding your workflow

### 4. COMPARISON: THIS TOOL VS. CHATGPT

CHATGPT IS BETTER FOR:

APOLLO IS BETTER FOR:



## 5. THREE WAYS TO USE THIS IN YOUR SHOP

### Use Case 1: Sales Rep - Retail Center Prospecting

Build a list: "Facilities Managers at shopping centers with 200,000+ sq ft in Florida." Apollo returns 150 contacts with direct emails. Export the list, upload to your CRM, and launch a 3-email sequence offering exterior signage audits.

### Use Case 2: Owner - University Campus Signage Pipeline

Search: "Facilities Directors at universities and colleges in the Southeast with 5,000+ students." Apollo returns contact info for 200+ decision-makers. Your sales team now has a prioritized call list instead of guessing.

### Use Case 3: Sales Manager - CRM Enrichment

Export your existing CRM contacts to CSV. Upload to Apollo. Apollo appends missing phone numbers, LinkedIn profiles, and job titles for 40-60% of your records—instantly making your CRM more useful.





## 6. TRY THIS WORKFLOW THIS WEEK

### WORKFLOW:

1. Sign up for Apollo.io free trial (includes 50 contact credits).
2. Search for: "Facilities Managers at retail companies in [YOUR CITY] with 50-500 employees."
3. Export 10-20 contacts with emails and phone numbers.
4. Send a personalized intro email using Apollo's sequencer.
5. Track opens and clicks to prioritize follow-ups.

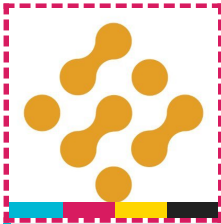
If you book one meeting, Apollo just paid for itself.

## 7. THE BUSINESS IMPACT

-  **Time Saved:** Prospecting tasks that took 2-3 hours now take 15 minutes
-  **Pipeline Growth:** Shops report 2-3x increase in qualified leads within 90 days
-  **Conversion:** Targeted outreach to verified decision-makers = higher response rates
-  **ROI:** \$49/month pays for itself with one new mid-size job

### YOUR ACTION THIS WEEK

Sign up for Apollo's free trial. Build one targeted list for a vertical you want to grow (retail, healthcare, hospitality). If the contact quality is better than your current prospecting method, upgrade.



# PLANPROPHET



CATEGORY 3: SALES & BIZ DEV

Cost: Custom Pricing | Difficulty: Advanced | Best For: Print MIS Users

## ! PAIN POINT

### 1. THE SHOP PROBLEM THIS SOLVES

Your print MIS (Printsmith, Avanti, EFI Pace, ShopVox) is powerful but clunky. Estimating still requires 10+ clicks through nested menus. Pulling custom reports means learning SQL or begging your IT vendor. Your sales reps avoid the system because it's slow and unintuitive. You're sitting on years of job data—customer history, material costs, repeat orders—but can't access it fast enough to make real-time decisions.

### 2. WHAT THIS TOOL ACTUALLY DOES

PlanProphet is an **AI layer that sits on top of your existing print MIS**. It uses natural language processing so you can type questions like "Show me all repeat customers who haven't ordered in 90 days" or "What was our average margin on vehicle wraps last quarter?" and get instant answers. It also automates estimating, inventory alerts, and order routing.

**Where it fits:** Print shops using Printsmith, Avanti, EFI Pace, or ShopVox who want faster estimating, better reporting, and proactive order management without replacing their MIS.

### 3. CAPABILITIES THAT MATTER

WHAT IT DOES	WHY YOUR SHOP CARES
Natural language queries: "Who are my top 10 customers by revenue?"	Get answers in seconds instead of wrestling with report builders
AI-assisted estimating that learns from past jobs	New hires can generate accurate quotes without 6 months of training
Proactive alerts: low inventory, late orders, margin erosion	Catch problems before they become emergencies
Integrates with Printsmith, Avanti Slingshot, EFI Pace, ShopVox	No MIS migration required—works with what you already have
Custom dashboards for owners, sales, and production	Everyone sees the metrics they care about—no clutter

### 4. COMPARISON: THIS TOOL VS. CHATGPT

CHATGPT IS BETTER FOR:

PLAN PROPHET IS BETTER FOR:



## 5. THREE WAYS TO USE THIS IN YOUR SHOP

### Use Case 1: Owner - Margin Analysis

Ask: "Show me jobs from last quarter where we lost money. What's the common pattern?" PlanProphet identifies that rush jobs under \$500 consistently run below target margin—giving you a pricing policy to fix.

### Use Case 2: Sales Rep - Customer Win-Back

Ask: "Which customers ordered from us last year but haven't ordered in the last 90 days?" PlanProphet returns a list with contact info and past order details—ready for a targeted follow-up campaign.

### Use Case 3: Production Manager - Inventory Alerts

PlanProphet learns your typical usage patterns and alerts you: "You're running low on 13oz banner material based on current job queue. Reorder in the next 3 days to avoid stockouts."

## 6. TRY THIS WORKFLOW THIS WEEK

### WORKFLOW:


PlanProphet requires integration with your MIS—this isn't a self-serve trial.

### ACTION THIS WEEK:

1. Visit [planprophet.ai](https://planprophet.ai) and request a demo.
2. During the demo, bring 3 questions you wish your MIS could answer instantly.
3. Watch how PlanProphet answers them in natural language.
4. If it saves your estimator 2+ hours per week, it pays for itself.

## 7. THE BUSINESS IMPACT

 **Time Saved:** Estimating time cut by 40-60%; reporting that took 30 minutes now takes 30 seconds

 **Margin Improvement:** Shops report 2-5% margin gains by identifying unprofitable job types

 **Training:** New sales reps productive in weeks instead of months

 **ROI:** Custom pricing but typically justifiable for shops doing \$2M+ annually

### YOUR ACTION THIS WEEK

If your shop uses Printsmith, Avanti, EFI Pace, or ShopVox and you're frustrated with slow reporting or complex estimating, request a PlanProphet demo. If it can answer 3 business questions faster than your current MIS, it's worth exploring.



# GENSPARK



CATEGORY 3: SALES & BIZ DEV

Cost: Free-\$20/mo | Difficulty: Beginner | Best For: Market Research

## ! PAIN POINT

### 1. THE SHOP PROBLEM THIS SOLVES

You need to research a new market, understand a client's industry before a pitch, or get up to speed on a competitor—fast. Traditional research means hours on Google, scattered tabs, conflicting sources, and still no clear summary. You don't have time to become an expert on "retail wayfinding trends" or "hospital ADA compliance updates"—you just need enough context to sound informed on a sales call.

### 2. WHAT THIS TOOL ACTUALLY DOES

GenSpark is an **AI research engine that creates custom mini-reports** on any topic. Type a question like "What are the biggest challenges in retail store signage in 2026?" and GenSpark generates a structured report with sections, citations, and visual diagrams—pulling from current web sources. It's like having a research analyst who can brief you on any topic in 90 seconds.

**Where it fits:** Pre-meeting client research, Competitive intelligence, Market trend analysis, RFP background prep.

### 3. CAPABILITIES THAT MATTER

WHAT IT DOES	WHY YOUR SHOP CARES
Generates structured reports with sections, bullets, and citations	No more scattered Google tabs—get organized research in one click
Visual diagrams and concept maps auto-generated	Quickly grasp complex topics (e.g., supply chain, regulatory trends)
Sources real-time web data	Get current market info, not outdated training data
Free tier available; \$20/mo for advanced	Accessible for small teams with tight budgets
Saves reports for team sharing	Build a library of industry knowledge your sales team can reference

### 4. COMPARISON: THIS TOOL VS. CHATGPT

CHATGPT IS BETTER FOR:

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GENSPARK IS BETTER FOR:

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## 5. THREE WAYS TO USE THIS IN YOUR SHOP

### Use Case 1: Sales Rep - Pre-Meeting Research

You have a pitch meeting with a regional healthcare system. Ask GenSpark: "What are the key ADA compliance trends for hospital wayfinding in 2026?" Review the 90-second report before the call—you'll sound informed and relevant.

### Use Case 2: Owner - Competitive Intelligence

A competitor just bought a new UV printer. Ask GenSpark: "What are the advantages and typical ROI of [Brand X] UV flatbed printers?" Understand their new capability before your next shared bid.

### Use Case 3: Estimator - Material Research

A client asks about sustainable signage options. Ask GenSpark: "What are the leading eco-friendly substrate options for indoor signage in 2026?" Get a summary with vendor examples and sustainability certifications.

## 6. TRY THIS WORKFLOW THIS WEEK

### WORKFLOW:

1. Go to [genspark.ai](https://genspark.ai) and sign up (free tier works).
2. Type a research question relevant to your next sales meeting:  
"What are the top trends in retail store signage for 2026?"
3. GenSpark generates a structured report in 60-90 seconds.
4. Review the report, click citation links to verify, and save it.
5. Use the insights in your pitch or proposal.

If it saves you 30 minutes of research, it's a keeper.

## 7. THE BUSINESS IMPACT

 **Time Saved:** Research that took 30-60 minutes now takes 2 minutes

 **Sales Confidence:** Walk into pitches better prepared—higher win rates

 **Team Knowledge:** Build a shared library of industry intelligence

 **ROI:** Free tier available; premium is \$20/mo—pays for itself with one better-informed proposal

### YOUR ACTION THIS WEEK

Use GenSpark to research one client's industry or one competitor before your next sales meeting. If the report helps you sound more informed and credible, add it to your pre-pitch routine.



# INSTANTLY



CATEGORY 3: SALES & BIZ DEV

Cost: \$30-97/mo | Difficulty: Intermediate | Best For: Cold Email

## ⚠️ PAIN POINT

### 1. THE SHOP PROBLEM THIS SOLVES

Your sales team sends cold emails manually—one at a time, from their personal Gmail, with no follow-up system. Most emails go to spam. You have no idea who opened what, no automated sequences, and no way to scale outreach without hiring more reps. Meanwhile, competitors are running systematic email campaigns that book meetings while you're still figuring out who to email next.

### 2. WHAT THIS TOOL ACTUALLY DOES

Instantly is a **cold email outreach platform with AI-powered deliverability**. It manages multiple sending accounts, warms them up to avoid spam filters, personalizes emails at scale, tracks opens/clicks/replies, and automates follow-up sequences. It's built specifically for B2B sales teams who need to send hundreds of personalized emails per week without getting blacklisted.

**Where it fits:** Cold outreach campaigns, Lead nurturing sequences, Sales follow-up automation, Email deliverability management.

### 3. CAPABILITIES THAT MATTER

WHAT IT DOES	WHY YOUR SHOP CARES
Sends emails from multiple accounts with automated warm-up	Avoid spam filters; your emails actually land in inboxes
AI personalization: auto-inserts names, companies, industries, custom variables	Send 500 "personalized" emails in the time it used to take to write 10
Automated follow-up sequences (e.g., email 1 → wait 3 days → email 2)	Persistence without manual work—most replies come from follow-ups
Real-time tracking: opens, clicks, replies, unsubscribes	Know who's interested before you pick up the phone
Integrates with Apollo, Clay, and most CRMs	Build lists in Apollo, automate outreach in Instantly—seamless workflow

### 4. COMPARISON: THIS TOOL VS. CHATGPT

CHATGPT IS BETTER FOR:

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INSTANTLY IS BETTER FOR:

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## 5. THREE WAYS TO USE THIS IN YOUR SHOP

### Use Case 1: Sales Rep - Retail Center Outreach

Export 200 facilities managers from Apollo into Instantly. Load a 3-email sequence: Email 1 = intro + value prop, Email 2 (3 days later) = case study, Email 3 (5 days later) = offer a free site audit. Instantly sends, tracks, and auto-follows up. You just handle replies.

### Use Case 2: Owner - Win-Back Campaign

Pull a list of customers who haven't ordered in 6+ months. Load into Instantly with a 2-email sequence: "We miss you" + special offer. Instantly personalizes with their company name and last order date. Track who opens and replies—prioritize warm leads.

### Use Case 3: Sales Manager - Trade Show Follow-Up

You collected 50 business cards at ISA Expo. Import into Instantly and send a personalized follow-up sequence: "Great meeting you at ISA" → case study → scheduling link. Instantly handles the follow-ups so your team doesn't forget anyone.

## 6. TRY THIS WORKFLOW THIS WEEK

### WORKFLOW:


1. Sign up for Instantly's \$30/mo plan (includes 5,000 email credits).
2. Connect one warm sending email account (not your main business email).
3. Import 20-50 prospects from a CSV (name, email, company).
4. Create a simple 2-email sequence:
  - Email 1: Short intro + value prop
  - Email 2 (3 days later): Follow-up + call-to-action
5. Launch campaign. Track opens and replies.


If you book one meeting, Instantly just paid for itself.

## 7. THE BUSINESS IMPACT

 **Time Saved:** Send 500 personalized emails per week vs. 20 manual emails

 **Pipeline Growth:** Shops report 5-10x more outbound meetings booked

 **Deliverability:** AI warm-up keeps emails out of spam—reply rates 2-3x higher than cold Gmail

 **ROI:** \$30-97/month pays for itself with one new mid-size job

### YOUR ACTION THIS WEEK

Sign up for Instantly. Import 20 prospects from one target vertical (retail, hospitality, healthcare). Send a 2-email test sequence. If you get replies, you've unlocked scalable outbound sales.



# MIDJOURNEY



CATEGORY 4: ASSET CREATION

Cost: \$10-60/mo | Difficulty: Intermediate | Best For: Design

## ! PAIN POINT

### 1. THE SHOP PROBLEM THIS SOLVES

Clients ask for custom illustrations, background textures, conceptual mockups, or "something like this stock photo but better"—but your designer is swamped, stock sites don't have what you need, and hiring a custom illustrator costs \$500+ and takes days. You need visual assets fast, but you don't have the budget or time for traditional custom artwork.

### 2. WHAT THIS TOOL ACTUALLY DOES

MidJourney is an **AI image generator** that creates custom, high-quality visuals from text descriptions. Type "photorealistic brick texture for outdoor mural mockup" or "modern hospital wayfinding icon set, minimalist, blue and white" and MidJourney generates four variations in 60 seconds. You pick the best one, refine it, and download at print resolution.

**Where it fits:** Proposal mockups and concept visuals, Custom backgrounds and textures, Icon and graphic asset creation, Client presentation imagery.

### 3. CAPABILITIES THAT MATTER

WHAT IT DOES	WHY YOUR SHOP CARES
Generates custom imagery from text prompts in ~60 seconds	No waiting on stock sites or freelance illustrators—assets on demand
Creates variations and refinements iteratively	Try 4 concepts, pick the best, refine—creative iteration at AI speed
High-resolution upscaling for print (up to 2048x2048, expandable)	Outputs are production-ready for most signage applications
Style references: upload a client's brand photo and match the aesthetic	Generate assets that feel consistent with their existing brand
\$10-60/month depending on usage tier	Cheaper than one stock photo subscription or one freelance project

### 4. COMPARISON: THIS TOOL VS. CHATGPT

CHATGPT IS BETTER FOR:

MIDJOURNEY IS BETTER FOR:



## 5. THREE WAYS TO USE THIS IN YOUR SHOP

### Use Case 1: Designer - Proposal Mockups

A client wants to see their retail storefront with new signage before committing. Use MidJourney to generate a photorealistic storefront background, then overlay your sign design in Photoshop. The mockup sells the vision in 10 minutes instead of 2 hours.

### Use Case 2: Sales Rep - Custom Icon Sets

A hospital client needs wayfinding icons (restroom, elevator, cafeteria, pharmacy). Use MidJourney: "minimalist hospital wayfinding icons, blue and white, accessible design." Generate 20 options, refine the best set, and deliver custom icons without hiring an illustrator.

### Use Case 3: Designer - Texture Library

You're designing a mural and need a unique brick texture or abstract pattern. Use MidJourney to generate custom backgrounds and textures that don't exist in stock libraries—differentiate your work from competitors using the same Shutterstock images.





## 6. TRY THIS WORKFLOW THIS WEEK

### WORKFLOW:

1. Sign up for MidJourney (\$10/mo Basic plan) and join their Discord server.
2. In the #newbies channel, type: /imagine prompt: photorealistic brick wall texture for outdoor mural, high resolution
3. MidJourney generates 4 variations in ~60 seconds.
4. Click "U1" (upscale option 1) to get full resolution.
5. Download and use in your next mockup or proposal.

If it saves you one stock photo search or one freelance request, it paid for itself.

## 7. THE BUSINESS IMPACT

-  **Time Saved:** Custom visuals in minutes instead of hours or days
-  **Cost Savings:** Eliminate \$500+ freelance illustration costs for concept work
-  **Proposal Quality:** Unique, custom visuals differentiate your bids from competitors using generic stock
-  **ROI:** \$10/month pays for itself with one won proposal that needed custom mockups

### YOUR ACTION THIS WEEK

Sign up for MidJourney's \$10 trial. Generate one visual asset you'd normally buy from a stock site or request from a freelancer. If the quality is good enough to use, you've unlocked a new design capability.



# GAMMA.APP



CATEGORY 4: ASSET CREATION

Cost: Free-\$20/mo | Difficulty: Beginner | Best For: Proposals

## ! PAIN POINT

### 1. THE SHOP PROBLEM THIS SOLVES

You need to create a professional proposal deck or client presentation, but PowerPoint takes forever—picking layouts, aligning text boxes, finding stock photos, making it look polished. Your sales team avoids creating proposals because design is hard. By the time you finish formatting, the client has moved on.

### 2. WHAT THIS TOOL ACTUALLY DOES

Gamma is an **AI-powered presentation builder** that generates fully designed slide decks from an outline or document. Type your proposal content (scope, timeline, pricing), and Gamma creates a professional, branded deck in 2 minutes—complete with layouts, images, and formatting. No design skills required.

**Where it fits:** Sales proposals and pitch decks, Client project presentations, Internal training materials, Capability overviews and portfolio showcases.

### 3. CAPABILITIES THAT MATTER

WHAT IT DOES	WHY YOUR SHOP CARES
Generates full slide decks from text outlines in ~2 minutes	Sales reps can create polished proposals without designer help
AI suggests layouts, images, and formatting automatically	No more struggling with PowerPoint alignment and design
Embed videos, before/after sliders, live charts, and interactive elements	Create dynamic proposals that stand out from static PDFs
Brand customization: upload your logo, set colors, save templates	Every deck looks consistent and professional
Shareable links with analytics: see who viewed which slides	Know if the client actually reviewed your proposal before you follow up

### 4. COMPARISON: THIS TOOL VS. CHATGPT

#### CHATGPT IS BETTER FOR:

Writing the proposal content and messaging—the words, not the design

#### GAMMA IS BETTER FOR:

Turning that content into a beautiful, interactive presentation—the design and delivery layer

## 5. THREE WAYS TO USE THIS IN YOUR SHOP

### Use Case 1: Sales Rep - Quick Proposal Deck

A retail client needs a wayfinding proposal by tomorrow. Paste your scope and pricing into Gamma: "Project overview, 3 phases, timeline, pricing breakdown, case study." Gamma generates a 10-slide deck with professional layouts in 2 minutes. Send the link and track when they view it.

### Use Case 2: Owner - Capability Presentation

You're pitching a new healthcare system. Use Gamma to create a capability deck: "Company intro, services, relevant case studies, certifications, team bios." Gamma designs it, you refine with your photos, and present it in the meeting—looks like you hired a design agency.

### Use Case 3: Sales Manager - Onboarding Training

New hires need training on your estimating process. Use Gamma to create an interactive training deck with embedded videos and checklists. Share the link so they can review at their own pace—Gamma tracks completion.

## 6. TRY THIS WORKFLOW THIS WEEK


### WORKFLOW:

1. Go to [gamma.app](https://gamma.app) and sign up (free tier works for testing).
2. Click "Generate" and type an outline for your next proposal:  
"Project Overview / Scope of Work / Timeline / Pricing / Case Study / Next Steps"
3. Gamma generates a full deck in ~90 seconds.
4. Customize with your logo, photos, and branding.
5. Share the link with your client—Gamma tracks views.

If you save 2 hours of PowerPoint formatting, it paid for itself.

## 7. THE BUSINESS IMPACT

 **Time Saved:** Proposal decks that took 3-4 hours now take 20 minutes

 **Designer Time:** Sales team stops needing design support for every deck

 **Proposal Quality:** Every deck looks professional and branded—higher win rates

 **Analytics:** Know if prospects actually reviewed your proposal before follow-up

### YOUR ACTION THIS WEEK

Use Gamma to create one proposal or capability deck you'd normally build in PowerPoint. If it looks professional and saves you 2+ hours, add it to your sales toolkit.



# NAPKIN.AI



CATEGORY 4: ASSET CREATION

Cost: Free-\$10/mo | Difficulty: Beginner | Best For: Visual Explainers

## ! PAIN POINT

### 1. THE SHOP PROBLEM THIS SOLVES

You need to explain a complex process—your sign fabrication workflow, a multi-phase installation timeline, ADA compliance requirements—but words alone don't stick. You want a simple flowchart or diagram, but creating one in PowerPoint or Visio takes 30 minutes of box-dragging and alignment frustration. Your clients need visuals to understand scope, but you don't have time to design them.

### 2. WHAT THIS TOOL ACTUALLY DOES

Napkin.ai is an **AI diagram generator** that turns text into visual explanations. Type or paste a process description (e.g., "Design → Proof → Print → Fabricate → Install") and Napkin generates a professional diagram, flowchart, or infographic in seconds. No design skills, no alignment hell—just instant visual clarity.

**Where it fits:** Process explanations in proposals, Project timelines and workflows, Scope-of-work breakdowns, Training materials and SOPs.

### 3. CAPABILITIES THAT MATTER

WHAT IT DOES	WHY YOUR SHOP CARES
Converts text into flowcharts, timelines, and diagrams automatically	Explain complex processes visually in 30 seconds instead of 30 minutes
Multiple visual styles: flowcharts, infographics, timelines, comparisons	Pick the format that best fits your proposal or presentation
Editable outputs: adjust colors, text, layout after generation	Refine to match your branding without starting from scratch
Export as PNG or SVG for high-res use in proposals and decks	Drop directly into client presentations and RFP responses
Free tier available; \$10/mo for unlimited	Accessible even for small teams with tight budgets

### 4. COMPARISON: THIS TOOL VS. CHATGPT

**CHATGPT IS BETTER FOR:**

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**NAPKIN IS BETTER FOR:**

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## 5. THREE WAYS TO USE THIS IN YOUR SHOP

### Use Case 1: Sales Rep - Project Timeline Visual

A client asks, "How long will this take?" Instead of listing phases in a bullet list, paste "Week 1: Design & Proofs → Week 2: Fabrication → Week 3: Installation & QC" into Napkin. It generates a clean timeline graphic you can drop into your proposal.

### Use Case 2: Estimator - Scope Breakdown

You're explaining a complex wayfinding project with 4 phases. Paste the scope into Napkin: "Phase 1: Site Survey → Phase 2: Design & Approvals → Phase 3: Production → Phase 4: Install & Training." Napkin creates a phased diagram that clarifies scope visually—reduces client confusion.

### Use Case 3: Owner - Training Materials

You're documenting your order intake process for new hires. Paste the workflow into Napkin: "Client inquiry → Quote → Approval → Job ticket → Production → QC → Install." Napkin generates a flowchart for your training manual—no PowerPoint wrestling required.





## 6. TRY THIS WORKFLOW THIS WEEK

### WORKFLOW:

1. Go to [napkin.ai](https://napkin.ai) and sign up (free tier works).
2. Paste a simple workflow you explain often:  
"Design → Client Approval → Print → Fabricate → Install → Final QC"
3. Napkin generates a visual diagram in ~10 seconds.
4. Pick your favorite style (flowchart, timeline, infographic).
5. Export as PNG and drop into your next proposal.

If it saves you 15 minutes of diagram-building, it's worth bookmarking.

## 7. THE BUSINESS IMPACT

-  **Time Saved:** Diagrams that took 30 minutes now take 30 seconds
-  **Clarity:** Visual scope breakdowns reduce client confusion and change orders
-  **Proposal Quality:** Professional diagrams make your proposals look more thorough
-  **Training:** Quickly document workflows for onboarding new staff

### YOUR ACTION THIS WEEK

Use Napkin to visualize one workflow or timeline you explain repeatedly in proposals. If the diagram saves you formatting time and improves client understanding, add it to your proposal template library.



# GELATO CONNECT



CATEGORY 4: PRODUCTION AUTOMATION

Cost: Custom / Demo Required | Difficulty: Advanced | Best For: Print Ops & Owners

## ! PAIN POINT

### 1. THE SHOP PROBLEM THIS SOLVES

Quote turnaround is killing deals—your team spends 45–90 minutes building estimates manually while competitors respond in minutes. On the production floor, jobs get lost between departments, machines sit idle waiting for instructions, and inventory runs dry mid-job. You're managing a complex operation from spreadsheets and email chains with no real-time visibility and no connected intelligence.

### 2. WHAT THIS TOOL ACTUALLY DOES

GelatoConnect is an **intelligent operating system for print production**—a single platform that unites your order intake, workflow automation, inventory, machine tracking, and shipping logistics. It replaces disconnected MIS tools and manual hand-offs with one connected system linking *Procurement* → *Workflow* → *Logistics*. Its AI Estimator generates accurate, customer-ready quotes in 15 seconds, cutting quoting labor by over 65%.

**Where it fits:** AI-powered estimating and quoting, End-to-end production workflow automation, Real-time floor visibility and inventory control, Intelligent order routing to partners.

### 3. CAPABILITIES THAT MATTER

WHAT IT DOES	WHY YOUR SHOP CARES
AI Estimator: generates accurate quotes in 15 seconds; customer-ready in under 5 minutes	Win more jobs by being first to respond—cut quoting labor by over 65%
End-to-end workflow automation from order intake to dispatch	Eliminate manual hand-offs; client base averages <0.35% production error rates
Real-time production tracking with mobile app for operators	Managers see live job status across the entire facility from any device
Intelligent Order Routing: auto-assign jobs to in-house teams or trusted partners	Say yes to overflow and new job types—achieve 25–100% growth without extra hiring
AI-powered inventory and procurement management	Never run out of material mid-job; ESP Colour freed \$500K via smarter procurement

#### 4. COMPARISON: THIS TOOL VS. CHATGPT

##### CHATGPT IS BETTER FOR:

General business thinking, drafting quotes manually, brainstorming—but it can't see your machines, orders, or live inventory

##### GELATOCONNECT IS BETTER FOR:

Connecting your entire print operation in real-time—the production intelligence layer ChatGPT can't provide



email: [Contact@SharedIntelAI.com](mailto:Contact@SharedIntelAI.com) 

**NOTES:** \_\_\_\_\_

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## 5. THREE WAYS TO USE THIS IN YOUR SHOP

### Use Case 1: Owner - AI-Powered Quoting

A client sends an RFP: 40 banner stands, 200 yard signs, and 50 pop-up displays—needed by Monday. Your team used to spend 2 hours building that estimate. With GelatoConnect's AI Estimator, an accurate quote is ready in 15 seconds and a customer-ready version in under 5 minutes. First to respond wins the job.

### Use Case 2: Production Manager - Real-Time Floor Visibility

Three jobs are running simultaneously and a client is calling to ask where their order is. GelatoConnect's mobile production tracking shows live job status across the entire facility. Operators scan job updates on their phones; the manager gets instant dashboard visibility—no more "let me check and call you back."

### Use Case 3: Sales Rep - Overflow Order Routing

A large retail client submits more orders than your press can handle this week. GelatoConnect's Intelligent Order Routing automatically assigns overflow to trusted partner facilities. The client is fulfilled on time, you keep the revenue, and no order gets turned away.

## 6. TRY THIS WORKFLOW THIS WEEK

### WORKFLOW:


1. Visit [gelato.com/connect](https://gelato.com/connect) and request a live demo.
2. In the demo, walk the AI Estimator through one of your typical complex sign jobs.
3. Compare quote time and accuracy vs. your current manual process.
4. Ask: "How does GelatoConnect integrate with our current MIS/workflow tools?"
5. Request a production tracking walkthrough—see how operators use the mobile app.
6. Ask for customer case study data from sign and wide-format print shops.

If the AI Estimator generates an accurate quote faster than your team, begin the deployment conversation.

## 7. THE BUSINESS IMPACT

 **Quoting Speed:** AI Estimator generates quotes in 15 seconds—cut quoting labor by 65%

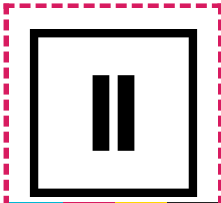
 **Material Savings:** Bennett Graphics cut material waste from 41% to 10% (75% reduction)

 **Capacity & Growth:** Oschatz increased production capacity 25%; TidyMerch achieved 100% revenue growth in one year without adding headcount

 **Reliability:** Client base averages <0.35% production error rates and 98% dispatch-on-time performance

### YOUR ACTION THIS WEEK

Request a GelatoConnect demo at [gelato.com/connect](https://gelato.com/connect). Walk the AI Estimator through one of your most complex, time-consuming quote types. If it generates an accurate estimate faster than your current process, begin the deployment conversation for your facility.



# ELEVENLABS



CATEGORY 5: VIDEO & AUDIO

Cost: Free-\$22/mo | Difficulty: Beginner | Best For: Voiceovers

## ! PAIN POINT

### 1. THE SHOP PROBLEM THIS SOLVES

You need professional voiceovers for proposal videos, training materials, or client presentations, but hiring voice talent costs \$200+ per project and takes days. Your own voice sounds unprofessional on camera, and you don't have time to record, re-record, and edit. Clients increasingly expect video proposals, but audio quality separates amateur from professional.

### 2. WHAT THIS TOOL ACTUALLY DOES

ElevenLabs is an **AI voice generator** that creates hyper-realistic voiceovers from text. Paste your script, pick a voice (professional, friendly, authoritative), and download broadcast-quality audio in 60 seconds. You can even clone your own voice—type new scripts and ElevenLabs speaks them in your voice, tone, and pacing.

**Where it fits:** Proposal video voiceovers, Training video narration, Phone system greetings, Social media video audio.

### 3. CAPABILITIES THAT MATTER

WHAT IT DOES	WHY YOUR SHOP CARES
Generates natural, human-like voiceovers from text in ~60 seconds	No more hiring voice talent or recording yourself 15 times to get it right
100+ pre-made voices (male, female, accents, tones, ages)	Match the voice to your brand: professional, friendly, authoritative
Voice cloning: upload 1 minute of your voice, ElevenLabs replicates it	Record training videos in "your voice" without recording every word
29 languages supported	Create localized content for Spanish-speaking markets or international clients
Commercial license included; \$5-22/mo depending on usage	Use in client-facing work without legal concerns

### 4. COMPARISON: THIS TOOL VS. CHATGPT

#### CHATGPT IS BETTER FOR:

Writing the voiceover script—the words, not the audio

#### ELEVENLABS IS BETTER FOR:

Turning that script into professional audio—the voice layer ChatGPT can't provide

## 5. THREE WAYS TO USE THIS IN YOUR SHOP

### Use Case 1: Sales Rep - Proposal Video Voiceover

You're sending a video proposal to a corporate client. Write a 90-second script explaining the scope, paste it into ElevenLabs, pick a professional voice, and download the audio. Pair it with slides or drone footage— instant polished proposal video.

### Use Case 2: Owner - Training Video Narration

You're creating an install safety training video for new hires. Record the video on your phone, write a narration script, and use ElevenLabs to generate the voiceover. No awkward self-recording—the training sounds professional.

### Use Case 3: Marketing Manager - Social Media Videos

You're posting before/after install videos on Instagram. Add voiceovers explaining the project using ElevenLabs—no need to hire a narrator or record yourself. Consistent, professional voice across all posts.

## 6. TRY THIS WORKFLOW THIS WEEK

### WORKFLOW:


1. Sign up for ElevenLabs (free tier gives you 10 minutes of audio/month).
2. Write a short script: "Welcome to [Your Company]. We specialize in custom signage for retail, healthcare, and hospitality."
3. Paste the script, pick a voice (try "Professional Male" or "Friendly Female").
4. Generate audio—takes ~30 seconds.
5. Download and use in your next video or phone greeting.

If the quality is broadcast-ready, you've unlocked professional voiceovers on demand.

## 7. THE BUSINESS IMPACT

 **Time Saved:** Voiceovers that took 3 hours (hire, record, edit) now take 3 minutes

 **Cost Savings:** Eliminate \$200+ per voice talent hire

 **Proposal Quality:** Professional audio elevates video proposals—higher win rates

 **Consistency:** Same voice across all training and marketing materials

### YOUR ACTION THIS WEEK

Generate one voiceover for a proposal video, training material, or social media post. If the audio quality is good enough to use publicly, add ElevenLabs to your content creation toolkit.



# HEYGEN / SYNTHESIA



CATEGORY 5: VIDEO & AUDIO

Cost: \$30-89/mo | Difficulty: Intermediate | Best For: AI Avatars

## ! PAIN POINT

### 1. THE SHOP PROBLEM THIS SOLVES

You want to create professional training videos, proposal presentations, or explainer content, but filming yourself on camera is awkward, time-consuming, and requires good lighting, editing, and multiple takes. Clients expect video content, but producing it traditionally costs thousands in video production or hundreds of hours of DIY work.

### 2. WHAT THIS TOOL ACTUALLY DOES

HeyGen and Synthesia are **AI avatar video platforms** that generate realistic talking-head videos from text scripts. Pick an avatar (or create one from your photo), paste your script, and the platform generates a video of the avatar speaking your words—with natural lip-sync, gestures, and expressions. No camera, no editing, no awkward self-recording.

**Where it fits:** Training and onboarding videos, Client proposal presentations, Product explainer videos, Internal communication and announcements.

### 3. CAPABILITIES THAT MATTER

WHAT IT DOES	WHY YOUR SHOP CARES
Generate realistic AI avatar videos from text scripts in minutes	Create professional training videos without filming anyone on camera
100+ avatars (diverse ages, ethnicities, attire) or clone your own face	Match the avatar to your brand: professional, friendly, or use your own likeness
40+ languages with natural lip-sync	Create localized training for Spanish-speaking crews or international clients
Add slides, images, branding, and screen recordings to videos	Build full training decks or proposal videos—not just talking heads
Templates for sales pitches, training, explainers	Start with proven formats—no video production experience needed

### 4. COMPARISON: THIS TOOL VS. CHATGPT

CHATGPT IS BETTER FOR:

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HEYGEN IS BETTER FOR:

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## 5. THREE WAYS TO USE THIS IN YOUR SHOP

### Use Case 1: Owner - Safety Training Video

You need to train new installers on ladder safety. Write a 5-minute script, paste it into HeyGen, pick a professional avatar, add photos of equipment. HeyGen generates a training video in 10 minutes. No filming, no editing—just done.

### Use Case 2: Sales Rep - Video Proposal

Instead of emailing a PDF proposal, create a 2-minute video proposal. Script: "Hi [Client Name], here's how we'll approach your wayfinding project..." HeyGen generates a personalized avatar video. Clients watch instead of reading—higher engagement.

### Use Case 3: Marketing Manager - Explainer Content

You want to post "What is ADA-compliant signage?" content on your website. Write a 90-second explainer script, generate an avatar video with HeyGen, and embed it on your services page. Looks like you hired a video production agency.

## 6. TRY THIS WORKFLOW THIS WEEK

### WORKFLOW:

1. Sign up for HeyGen or Synthesia (both offer free trials).
2. Write a short training or explainer script (1-2 minutes).
3. Pick an avatar that fits your brand.
4. Paste the script, add any slides or images.
5. Generate the video—takes ~5 minutes.
6. Review and download.

If the video looks professional enough to share publicly, you've unlocked scalable video content.

## 7. THE BUSINESS IMPACT

 **Time Saved:** Videos that took 1-2 days to produce now take 15 minutes

 **Cost Savings:** Eliminate \$2,000+ video production costs for training and proposals

 **Proposal Win Rate:** Video proposals get 3x higher open/view rates than PDFs

 **Training Scalability:** Update training videos by editing text—no re-filming required

### YOUR ACTION THIS WEEK

Create one training video or proposal video using HeyGen or Synthesia. If the output quality is good enough to use with clients or staff, add avatar videos to your content toolkit.



# DESCRIPT



CATEGORY 5: VIDEO & AUDIO

Cost: Free-\$24/mo | Difficulty: Beginner | Best For: Video Editing

## ! PAIN POINT

### 1. THE SHOP PROBLEM THIS SOLVES

You film install videos, training content, or client testimonials, but editing them in Premiere or iMovie is slow, technical, and frustrating. You need to cut "ums," remove silences, add captions, and fix mistakes—but traditional video editing requires scrubbing timelines and hunting for bad takes. By the time you finish editing, you've wasted 3 hours on a 2-minute video.

### 2. WHAT THIS TOOL ACTUALLY DOES

Descript is a **text-based video editor** that transcribes your video automatically, then lets you edit the video by editing the transcript. Delete a word from the transcript? That word disappears from the video. Need captions? They're auto-generated. You can even re-record audio by typing new words—Descript clones your voice and inserts them seamlessly.

**Where it fits:** Quick-editing install videos for social media, Adding captions to training videos, Cleaning up client testimonials, Creating before/after project showcases.

### 3. CAPABILITIES THAT MATTER

WHAT IT DOES	WHY YOUR SHOP CARES
Edit video by editing text—delete filler words, rearrange sentences	No more scrubbing timelines—edit as fast as you can read
Auto-generates accurate captions and subtitles	80% of social media is watched without sound—captions = engagement
Removes filler words ("um," "uh," "like") with one click	Polish client testimonials or training videos instantly
Overdub: type corrections and Descript synthesizes them in your voice	Fix mistakes without re-recording—just type the correction
Templates for social media (1:1, 9:16, 16:9 with captions)	Repurpose one video into Instagram, TikTok, and YouTube formats automatically

### 4. COMPARISON: THIS TOOL VS. CHATGPT

#### CHATGPT IS BETTER FOR:

Planning video scripts and messaging strategy

#### DESCRIPT IS BETTER FOR:



## 5. THREE WAYS TO USE THIS IN YOUR SHOP

### Use Case 1: Marketing Manager - Social Media Before/After Videos

Film a 3-minute install walkthrough on your phone. Upload to Descript. It transcribes automatically. Delete the rambling intro, cut the "ums," add captions. Export in 1:1 for Instagram and 9:16 for TikTok. Total editing time: 10 minutes instead of 2 hours in iMovie.

### Use Case 2: Sales Manager - Client Testimonial Cleanup

A happy client records a video testimonial but says "um" 15 times. Upload to Descript, click "Remove Filler Words." Descript cleans it automatically. Add captions, export—ready to post. No manual editing required.

### Use Case 3: Owner - Training Video Updates

You recorded a safety training video last year, but the policy changed. Instead of re-filming, open it in Descript, delete the outdated section from the transcript, and type the new policy. Descript generates the audio in your voice and edits it into the video. No re-recording.

## 6. TRY THIS WORKFLOW THIS WEEK

### WORKFLOW:

1. Record a 2-minute install or project video on your phone.
2. Upload to Descript (free tier works for testing).
3. Descript transcribes the video automatically.
4. Edit the transcript: delete "ums," cut rambling sections, rearrange sentences.
5. Click "Add Captions" and pick a caption style.
6. Export for social media (1:1, 9:16, or 16:9).

If editing took 10 minutes instead of 1 hour, Descript just became your video editor.

## 7. THE BUSINESS IMPACT

 **Time Saved:** Video editing that took 2-3 hours now takes 15-20 minutes

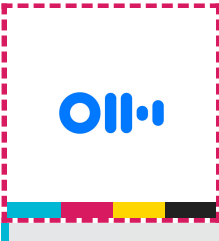
 **Content Volume:** Produce 5x more video content in the same time

 **Engagement:** Captions increase social media watch time by 80%

 **Accessibility:** Beginner-friendly—anyone can edit video, no Premiere Pro expertise needed

### YOUR ACTION THIS WEEK

Upload one raw install or project video to Descript. Edit it by editing the transcript. If it saves you an hour of video editing, adopt Descript as your primary video tool.



# OTTER.AI



CATEGORY 5: VIDEO & AUDIO

Cost: Free-\$17/mo | Difficulty: Beginner | Best For: Meeting Notes

## ! PAIN POINT

### 1. THE SHOP PROBLEM THIS SOLVES

You're in back-to-back client calls, site visits, and team meetings—taking notes by hand or scrambling to remember what was said. Action items get lost, client requirements are misremembered, and you waste time writing follow-up emails from memory. Nobody has time to listen to hour-long recordings to pull out the 3 important decisions.

### 2. WHAT THIS TOOL ACTUALLY DOES

Otter.ai is a **meeting transcription and note-taking assistant** that records conversations, transcribes them in real time, and auto-generates summaries with action items. Join your Zoom or Google Meet, and Otter listens, transcribes, and highlights key points. After the meeting, you get a searchable transcript and summary—no manual note-taking required.

**Where it fits:** Client discovery calls and site visits, Internal team meetings, Project kickoff calls, Trade show conversations and followups.

### 3. CAPABILITIES THAT MATTER

WHAT IT DOES	WHY YOUR SHOP CARES
Real-time transcription of meetings (in-person, Zoom, Google Meet)	Never miss a client requirement or decision—everything is captured
Auto-generates meeting summaries and action items	Send follow-up emails with accurate next steps—no more "I think they said..."
Searchable transcripts: find specific quotes or topics instantly	Client said "blue" but the design shows green? Search the transcript to verify
Integrates with Zoom, Google Meet, Microsoft Teams	Otter joins as a bot—works with tools you already use
Share transcripts with team or clients	Everyone gets aligned—no "I wasn't in that meeting" confusion

### 4. COMPARISON: THIS TOOL VS. CHATGPT

CHATGPT IS BETTER FOR:

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OTTER IS BETTER FOR:

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## 5. THREE WAYS TO USE THIS IN YOUR SHOP

### Use Case 1: Sales Rep - Client Discovery Calls

Join a Zoom call with a new client. Otter transcribes the call in real time. After the call, Otter generates a summary with action items ("Send quote for 20 monument signs by Friday"). Use the summary to write a detailed follow-up email—accurate and fast.

### Use Case 2: Project Manager - Site Visit Notes

Walk a jobsite with your installer, recording voice notes on your phone with Otter. "South wall needs 3 ADA signs, elevator lobby needs directory, restroom corridor needs 5 room numbers." Otter transcribes it. Back at the office, you have a complete site survey without handwritten notes.

### Use Case 3: Owner - Team Meeting Accountability

Record your weekly production meeting with Otter. Otter generates a transcript and highlights action items. Share the summary with the team—everyone knows exactly what they committed to do this week.

## 6. TRY THIS WORKFLOW THIS WEEK

### WORKFLOW:

1. Download Otter.ai (free tier works for testing).
2. Before your next client call or team meeting, start Otter recording (or add the Otter bot to Zoom).
3. Let Otter transcribe the meeting in real time.
4. After the meeting, review the auto-generated summary and action items.
5. Send the summary to attendees for alignment.

If you save 30 minutes of note-writing per meeting, Otter just became essential.

## 7. THE BUSINESS IMPACT

 **Time Saved:** Eliminate 30-60 minutes per meeting spent writing notes and summaries

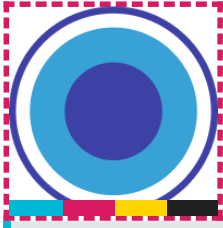
 **Error Prevention:** Accurate transcripts prevent costly miscommunications

 **Accountability:** Searchable action items = better follow-through

 **Client Experience:** Detailed follow-up emails show professionalism and attentiveness

### YOUR ACTION THIS WEEK

Use Otter on one client call or site visit this week. If the transcript and summary save you time and improve accuracy, add it to your meeting routine.



# TAPLIO



CATEGORY 5: VIDEO & AUDIO

Cost: \$39-196/mo | Difficulty: Beginner | Best For: LinkedIn Growth

## ! PAIN POINT

### 1. THE SHOP PROBLEM THIS SOLVES

LinkedIn is where your B2B clients spend time—facilities managers, property owners, purchasing agents—but your company profile is dormant. You know you should post project updates, industry insights, and thought leadership, but creating content takes hours, and you don't know what to post or when. Meanwhile, competitors are building visibility and inbound leads while you're invisible.

### 2. WHAT THIS TOOL ACTUALLY DOES

Taplio is a **LinkedIn growth and content automation tool** powered by AI. It suggests post ideas, helps you write high-performing content, schedules posts at optimal times, and tracks engagement. It also identifies prospects engaging with your content and automates outreach—turning LinkedIn from a "nice to have" into a lead generation engine.

**Where it fits:** Building your company's LinkedIn presence, Personal branding for owners and sales reps, Lead generation from LinkedIn engagement, Content creation and scheduling.

### 3. CAPABILITIES THAT MATTER

WHAT IT DOES	WHY YOUR SHOP CARES
AI-powered post ideas and content generation	Never stare at a blank screen—Taplio suggests topics and writes drafts
Scheduling and auto-posting at peak engagement times	Post consistently without logging into LinkedIn daily
Lead finder: identifies prospects who engage with your content	See who viewed your posts—reach out while you're top of mind
Carousel and PDF post generator	Create visual "how-to" posts (e.g., "5 Steps to ADA-Compliant Signage") that get 3x engagement
Analytics: track which posts drive profile views and connection requests	Double down on what works—stop guessing about LinkedIn strategy

### 4. COMPARISON: THIS TOOL VS. CHATGPT

CHATGPT IS BETTER FOR:

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TAPLIO IS BETTER FOR:

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## 5. THREE WAYS TO USE THIS IN YOUR SHOP

### Use Case 1: Owner - Thought Leadership

Use Taplio's AI to generate 4 posts per week: industry trends, project showcases, quick tips ("3 Mistakes in ADA Signage Quotes"). Schedule them for the next month. Taplio posts automatically. Your LinkedIn presence grows without daily effort—inbound leads start trickling in.

### Use Case 2: Sales Rep - Engage and Reach Out

Post a before/after project photo with Taplio. Taplio tracks who views and likes the post. Export the list of engaged prospects—they've already shown interest. Send personalized connection requests referencing the post. Warm outreach instead of cold calling.

### Use Case 3: Marketing Manager - Carousel Content

Use Taplio's carousel generator to create a visual post: "5 Signs Your Wayfinding Needs an Upgrade." Post performs 3x better than text-only. Taplio tracks engagement—repurpose the content for email and website.

## 6. TRY THIS WORKFLOW THIS WEEK

### WORKFLOW:

1. Sign up for Taplio (free trial available).
2. Use the AI post generator to create 3-5 LinkedIn posts (project showcases, tips, insights).
3. Schedule them to post at optimal times over the next 2 weeks.
4. Turn on "Lead Finder" to track who engages with your posts.
5. After 2 weeks, check analytics—if you gained profile views or inbound messages, Taplio is working.

If LinkedIn starts generating leads, Taplio just became part of your marketing stack.

## 7. THE BUSINESS IMPACT

 **Time Saved:** Create and schedule 20 posts in 1 hour instead of posting daily

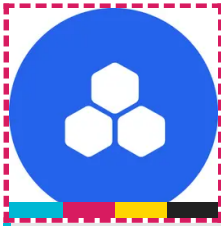
 **Inbound Leads:** Consistent LinkedIn presence generates 3-5 warm inbound inquiries per month

 **Visibility:** Show up in decision-makers' feeds—build brand recognition before they need signage

 **Lead Nurturing:** Engage prospects who viewed your posts—warm outreach beats cold calls

### YOUR ACTION THIS WEEK

Use Taplio to create and schedule 5 LinkedIn posts (project photos, tips, insights). Turn on lead tracking. If you gain profile views or engagement from target prospects, commit to consistent LinkedIn posting.



# FEEDHIVE



CATEGORY 5: VIDEO & AUDIO

Cost: \$29-199/mo | Difficulty: Beginner | Best For: Multi-Platform Social

## ! PAIN POINT

### 1. THE SHOP PROBLEM THIS SOLVES

You need to post on LinkedIn, Instagram, Facebook, and Twitter to stay visible, but managing 4 platforms manually is overwhelming. You forget to post, content sits in drafts, and tracking what works across platforms is a spreadsheet nightmare. Competitors who post consistently win the visibility game while you're stuck reacting instead of planning.

### 2. WHAT THIS TOOL ACTUALLY DOES

FeedHive is a **multi-platform social media scheduler with AI content generation**. Create posts once, FeedHive adapts them for each platform (LinkedIn, Instagram, Facebook, Twitter), schedules them at optimal times, and tracks performance. AI helps you write variations, suggests hashtags, and predicts which posts will perform best—turning social media from chaos into a system.

**Where it fits:** Multi-platform social media management, Content batching and scheduling, Performance tracking and analytics, AI-assisted post creation.

### 3. CAPABILITIES THAT MATTER

WHAT IT DOES	WHY YOUR SHOP CARES
Schedule posts across LinkedIn, Instagram, Facebook, Twitter from one dashboard	Manage all platforms in 1 hour per week instead of logging in daily
AI-powered post generation and variations	Create 4 platform-specific versions of one post idea in seconds
Predictive analytics: AI scores posts before publishing	Know which posts will perform best—optimize before you hit publish
Hashtag suggestions and first-comment automation	Maximize reach without manual hashtag research
Performance tracking with best-time-to-post recommendations	Double down on what works—stop guessing about posting strategy

### 4. COMPARISON: THIS TOOL VS. CHATGPT

CHATGPT IS BETTER FOR:

FEEDHIVE IS BETTER FOR:



## 5. THREE WAYS TO USE THIS IN YOUR SHOP

### Use Case 1: Marketing Manager - Content Batching

Spend 1 hour creating 20 posts (project photos, tips, client testimonials). Use FeedHive's AI to adapt each for LinkedIn, Instagram, Facebook. Schedule them for the next month across all platforms. FeedHive posts automatically—your social presence is consistent without daily effort.

### Use Case 2: Owner - Performance Optimization

Post the same before/after project photo on all platforms. FeedHive tracks which platform drives the most website clicks. Next month, allocate more effort to the winner. Data-driven social strategy instead of guessing.

### Use Case 3: Sales Rep - Repurpose Top Content

A LinkedIn post about ADA compliance got 50+ likes. Use FeedHive to reshare it 3 months later with slight variations. FeedHive suggests the best time to repost. Maximize ROI from your best-performing content.





## 6. TRY THIS WORKFLOW THIS WEEK

### WORKFLOW:

1. Sign up for FeedHive (free trial available).
2. Connect your LinkedIn, Instagram, Facebook, and Twitter accounts.
3. Create 5 posts (project photos, tips, quick wins).
4. Use FeedHive's AI to adapt each post for all 4 platforms.
5. Schedule them to post at optimal times over the next 2 weeks.
6. Check analytics after 2 weeks—see which platform and content type performs best.

If FeedHive saves you 3+ hours per week, it just became your social media command center.

## 7. THE BUSINESS IMPACT

-  **Time Saved:** Manage 4 platforms in 1-2 hours per week instead of 1 hour per day
-  **Consistency:** Posting 3-5x per week = 3x higher brand recall and inbound inquiries
-  **Data-Driven:** Stop guessing—double down on platforms and content that drive leads
-  **ROI:** \$29/month pays for itself if consistent posting generates one extra lead per quarter

### YOUR ACTION THIS WEEK

Batch-create 10 social posts in FeedHive and schedule them across LinkedIn, Instagram, Facebook. If it saves you 2+ hours and your posting becomes consistent, commit to using FeedHive as your social media hub.

# START HERE: WHAT'S YOUR BIGGEST CHALLENGE?



## PAIN POINT NAVIGATOR — FIND YOUR TOOLS FAST

Don't know where to begin? Locate your biggest pain point below and find your recommended tools. Every recommendation includes a free tier — no credit card needed to start.

### "Quotes take too long — we're losing jobs"

Competitors respond in minutes. Your team needs 45–90 minutes.

#### ▶ YOUR TOOLS

- **GelatoConnect** — AI quotes in 15 sec
- **PlanProphet** — Print MIS automation
- **ChatGPT** — Draft quote templates fast

### "Admin work is eating my whole day"

Emails, follow-ups, meeting notes, data entry — it never ends.

#### ▶ YOUR TOOLS

- **Zapier** — Automate repetitive tasks
- **Otter.ai** — Auto meeting notes & follow-ups
- **Numerous.ai** — AI inside your spreadsheets

### "I need more leads — the pipeline is dry"

Not enough new clients; relying too heavily on repeat business.

#### ▶ YOUR TOOLS

- **Apollo.io** — Find & contact ideal leads
- **Instantly** — Automated email outreach
- **GenSpark** — Market research & targeting

### "Our marketing materials look amateur"

No in-house designer. Proposals and social posts look cobbled together.

#### ▶ YOUR TOOLS

- **MidJourney** — AI concept images
- **Gamma.app** — Proposal decks in 10 min
- **Napkin.ai** — Visual explainers, no design skills

# START HERE: CONTINUED

## PAIN POINTS 5-8 + QUICK-START TIP

### "We have zero social media presence"

Clients can't find you online. Competitors are all over LinkedIn and Instagram.

#### ▶ YOUR TOOLS

- **FeedHive** — Schedule all platforms in 1 hr/wk
- **Taplio** — LinkedIn growth & lead gen
- **ElevenLabs** — Pro voiceovers for content

### "Research & prep takes way too long"

Market data, competitor pricing, client intel — hours of digging every week.

#### ▶ YOUR TOOLS

- **Perplexity AI** — Cited web research in seconds
- **NotebookLM** — Q&A on your own documents
- **ChatGPT** — General analysis & thinking

### "I want video content but have no budget"

Training videos, testimonials, social clips — all seem out of reach without a crew.

#### ▶ YOUR TOOLS


- **HeyGen** — AI avatar videos, no camera
- **Descript** — Edit video like a Word doc
- **ElevenLabs** — Studio-quality voiceover, \$5/mo


### "Competitors have better data than we do"

They know your prospects before you do. You're flying blind on outreach.

#### ▶ YOUR TOOLS

- **Clay.com** — AI-powered data enrichment
- **Apollo.io** — Contact & buyer intent data
- **Perplexity AI** — Real-time competitive intel

 **PRO TIP — WHERE TO START:** Most shops identify 2–3 pain points above. *Don't try to solve them all at once.* Pick the one that costs you the most money or time right now. Start with the free tier of the first recommended tool. Get one measurable win in 30 days. Then expand.

 **Full tool profiles** with workflows, use cases, and action items are in the Tool Profiles section. The 30-60-90 day adoption roadmap is in the Roadmap section. Budget tiers are in the Budget Stack section.

# BUILD YOUR AI STACK: THREE BUDGET TIERS

START FREE · GROW SMART · SCALE WHEN READY

Every tool in this guide has a free tier or trial. Start with what costs nothing. Add paid tools only *after* the free version proves its value to your shop.

## TIER 1: FREE STARTER STACK

\$0 / month

Use these this week — no credit card needed.

TOOL	FREE TIER INCLUDES	BEST FIRST USE
ChatGPT	GPT-4o mini, unlimited basic prompts	Rewrite 3 client emails in your tone
NotebookLM	50 notebooks, unlimited Q&A on docs	Upload your price list; ask it questions
Perplexity AI	Unlimited cited web searches	Research a prospect's business in 60 sec
GenSpark	Free AI-generated market research	Build a local sign-buyer prospect list
Napkin.ai	Free during beta; unlimited diagrams	Visualize your production workflow

## TIER 2: GROWTH STACK

~\$75–120 / month

Add after 30 days of free wins. Pick 2–3 that match your top pain point.

TOOL	ENTRY PLAN	WHY IT'S WORTH IT
MidJourney	Basic \$10/mo	Client-ready concept visuals in every proposal
ElevenLabs	Starter \$5/mo	Professional voiceovers without a studio
Gamma.app	Plus \$8/seat/mo	Designed proposals in 10 minutes
FeedHive	Solo \$19/mo	All social platforms managed in 1 hr/week
Instantly	Growth \$37/mo	Automated cold outreach to new prospects

## TIER 3: FULL GROWTH STACK

\$300–500+ / month

Add Tier 2 tools first. These unlock serious scale — adopt only when ready.

TOOL	ENTRY PLAN	UNLOCKS
Apollo.io	~\$79/user/mo	Full lead database + intent signals
HeyGen	Creator \$29/mo	AI avatar training & marketing videos
Taplio	Starter \$39/mo	LinkedIn lead gen at scale



# YOUR 30-60-90 DAY AI ADOPTION ROADMAP


## A PHASED PLAN FOR SIGN SHOP OWNERS — ZERO OVERWHELM

The biggest mistake shops make: trying everything at once. This plan gives you one goal per month, a clear budget progression, and a measurable milestone before you move forward.

### 17 **DAYS 1–30 | ESTABLISH YOUR FREE FOUNDATION**

*Goal: Build daily AI habits. \$0 spend. Prove the concept before spending a cent.*


- **Week 1:** Set up ChatGPT (free). Use it to rewrite one client email and draft one proposal section every day.
- **Week 2:** Add NotebookLM (free). Upload your pricing sheet, past proposals, and one vendor spec PDF.
- **Week 3:** Use Perplexity AI (free) before every client meeting for 60-second prospect research.
- **Week 4:** Try GenSpark + Napkin.ai (both free). Create one visual explainer for a question you answer repeatedly.

 **30-Day Milestone:** AI is saving you at least 1 hour per day with zero spend.

### 17 **DAYS 31–60 | UPGRADE WITH TARGETED PAID TOOLS**

*Goal: Invest in your #1 pain point. Budget: \$50–120/mo max. Pick tools from Tier 2.*

- **Week 5:** Start MidJourney Basic (\$10/mo). Generate AI concept images for your next 3 client proposals.
- **Week 6:** Add Gamma.app Plus (\$8/mo). Build one full client presentation from an AI-generated outline.
- **Week 7:** Set up FeedHive Solo (\$19/mo). Batch-create and schedule 2 weeks of social posts in one 90-minute session.
- **Week 8:** Add either ElevenLabs Starter (\$5/mo) for voiceovers or Instantly Growth (\$37/mo) for outreach — based on your top gap.

 **60-Day Milestone:** Marketing materials look professional. Social content is consistent. ~\$100/mo spend pays for itself.

### 17 **DAYS 61–90 | LAYER IN SALES & PRODUCTION AUTOMATION**

*Goal: Use AI to actively generate revenue and win more jobs — not just save time.*



# AI JARGON BUSTER: PLAIN ENGLISH GLOSSARY



FOR SIGN SHOP OWNERS — NO TECH BACKGROUND NEEDED

These 12 terms come up constantly in AI conversations. Knowing them will help you evaluate tools, ask better vendor questions, and avoid being oversold.

## AI — Artificial Intelligence

Software that mimics human thinking — reading, writing, analyzing, and deciding. In this guide, AI means tools that draft emails, answer questions, or automate tasks without you programming every step.

## LLM — Large Language Model

The engine behind ChatGPT, Gemini, Claude, and Copilot. Trained on billions of text examples so it can read and write like a human. Think of it as an extremely well-read assistant who never sleeps.

## Prompt

The instruction or question you type into an AI tool. Weak: "Write an email." Strong: "Write a 3-sentence follow-up to a sign buyer who didn't respond to our site survey quote. Professional tone, no pressure."

## Hallucination

When AI confidently states something factually wrong — a made-up statistic, wrong date, or fake case study. **Always verify AI-generated facts before sending to clients.** Use Perplexity AI for cited, verifiable research.

## Workflow Automation

Software automatically does a task when a trigger happens — no clicking required. Example: new web lead → Zapier → CRM entry + welcome email fires instantly, 24/7, without anyone touching it.

## API — Application Programming Interface

The "pipe" that lets two software tools share data. You don't build one — Zapier and Clay use APIs so you can connect apps by clicking, not coding. When a vendor says "we have an API," it means their tool can connect to others.

## Integration

Two tools are connected so data flows between them automatically. Your email platform "integrates" with your CRM — new contacts sync without manual entry. Most tools in this guide list their integrations on their pricing page.

## RAG — Retrieval-Augmented Generation

AI that searches *your own documents* before answering. NotebookLM uses RAG — it reads your uploaded files and responds based on YOUR data, not just what it was trained on. No hallucinated specs from your price list.



# DATA & PRIVACY QUICK REFERENCE



## KNOW BEFORE YOU TYPE — PROTECT YOUR CLIENTS & YOUR SHOP

Before entering client names, job specs, pricing, or proprietary data into any AI tool, check this table. Default policies can change — always verify on each tool's current Privacy/Terms page.

TOOL	DEFAULT: TRAINS ON YOUR DATA?	SAFE FOR CLIENT DATA?	WHAT TO DO
ChatGPT	⚠️ Yes by default (free/Plus)	✅ After opt-out	Settings → Data Controls → turn off "Improve model for everyone"
Gemini	⚠️ Yes by default (personal)	✅ With Workspace plan	Use Google Workspace Business account for client work
NotebookLM	⚠️ May be used by Google	⚠️ Use with caution	Avoid uploading confidential client contracts; use for internal docs only
Perplexity AI	✅ Does not train on queries	✅ Yes	Safe for general business queries and research
Claude	✅ No training by default	✅ Yes	Strong privacy defaults; confirm on <a href="https://claude.ai/legal">claude.ai/legal</a> for current policy
Zapier	✅ Does not train on your data	✅ Yes	Enterprise plan includes Data Processing Addendum (DPA)
Apollo.io	✅ SOC2 Type II; no AI training	✅ Yes	Compliant with GDPR/CCPA; standard for sales data
MidJourney	⚠️ Prompts visible by default	⚠️ Use Stealth Mode	Enable Stealth Mode (Pro \$60/mo) if prompts include proprietary design briefs
ElevenLabs	⚠️ Audio stored on servers	✅ Business plan	Use Business/Enterprise plan for client voice cloning projects
HeyGen	✅ SOC2 compliant	✅ Yes	Confirm avatar consent agreements when cloning client likeness
Otter.ai	⚠️ Transcripts stored in cloud	⚠️ Notify meeting participants	Always disclose recording. Business plan has admin data controls.
GelatoConnect	✅ Enterprise SaaS; DPA available	✅ Yes	Request Data Processing Addendum during contract negotiation



# DEMO & SIGN-UP CHEAT SHEET



ALL 20 TOOLS — ONE PAGE — PHOTOGRAPH THIS BEFORE YOU LEAVE

Start today: every tool below has a free tier or free trial. No commitments until you've seen value. Demo links marked are recommended first stops for that category.

CATEGORY 1: THINKING PARTNERS		
TOOL	FREE?	URL
ChatGPT	✓	chat.openai.com
Gemini	✓	gemini.google.com
Claude	✓	claude.ai
NotebookLM	✓	notebooklm.google.com
Perplexity AI	✓	perplexity.ai

CATEGORY 2: AUTOMATION LAYER		
TOOL	FREE?	URL
Zapier	✓	zapier.com
Clay.com	Demo	clay.com
Numerous.ai	✓	numerous.ai

CATEGORY 3: SALES & BIZ DEV		
TOOL	FREE?	URL
Apollo.io	✓	apollo.io
PlanProphet	Demo	planprophet.com
GenSpark	✓	genspark.ai
Instantly	Trial	instantly.ai

CATEGORY 4: ASSET CREATION + PRODUCTION		
TOOL	FREE?	URL
MidJourney	Trial	midjourney.com (\$10/mo)
Gamma.app	✓	gamma.app
Napkin.ai	✓	napkin.ai
GelatoConnect	Demo	gelato.com/connect

CATEGORY 5: VIDEO, AUDIO & MARKETING			
TOOL	FREE?	URL	ENTRY PAID PLAN
ElevenLabs	✓	elevenlabs.io	Starter \$5/mo
HeyGen	✓	heygen.com	Creator \$29/mo
Descript	✓	descript.com	Hobbyist \$24/mo
Otter.ai	✓	otter.ai	Pro \$16.99/user/mo
Taplio	Trial	taplio.com	Starter \$39/mo

